

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 3 - Passages - HICAP

From: 07/01/2010 To: 06/30/2011

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	37	46	18	19	120
Estimated Number of Attendees	467	4,172	287	473	5,399
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	5	6	1	9	21
Estimated Number of Attendees	288	895	75	518	1,776
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	1	1
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	1	1	0	0	2
Estimated Number of Attendees	1	6	0	0	7
Estimated Number of Persons Received Any Enrollment Assistance	0	1	0	0	1
Enrollment Assistance with Medicare Programs(s)	0	1	0	0	1
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	3	1	0	4
Estimated Number of Attendees	0	31,100	10,000	0	41,100
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	1	0	1	2
Estimated Number of Attendees	0	70,000	0	29,000	99,000
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	1	1	2	4	8
Estimated Number of Persons Reached	20,000	600	600,154	45,170	665,924

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	10	16	17	20	<b>63</b>
Estimated Number of Targeted Persons Reached	114,580	128,525	140,289	5,071,194	<b>5,454,588</b>
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	0	0	26	45	<b>71</b>
Total Hours for Length of Activities	0.00	0.00	72.35	253.40	<b>325.75</b>
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	<b>0</b>
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	<b>0.00</b>
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	6	1	<b>7</b>
Total Hours for Length of Activities	0.00	0.00	55.45	5.00	<b>60.45</b>
<b>Other Presenters</b>					
Total Presenters	0	0	2	8	<b>10</b>
Total Hours for Length of Activities	0.00	0.00	4.00	3.00	<b>7.00</b>
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	6	47	7	12	<b>22</b>
Employer Termination - COBRA	0	0	4	18	<b>2</b>
General HICAP Information	0	0	0	2	<b>2</b>
Grievances / Appeals - Plan Issues	78	74	39	45	<b>236</b>
Long-Term Care / Insurance	9	13	4	6	<b>32</b>
Low Income Subsidy (LIS) / Application Assistance	8	10	12	8	<b>38</b>
Medicare (Parts A & B)	59	47	16	28	<b>150</b>
Medicare Advantage (Part C)	28	48	24	38	<b>138</b>
Medicare Fraud / Abuse	23	66	20	26	<b>135</b>
Medicare Prescription Drug Coverage (Part D)	42	42	14	21	<b>119</b>
Medigap / Medicare Supplements	44	68	28	39	<b>179</b>
Non-Medicare Fraud/Abuse	27	41	17	29	<b>114</b>
Other Topics / Issues (Health Specific)	3	1	2	0	<b>6</b>
	28	35	21	21	<b>105</b>

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	7	10	17
Preventive Care Benefits	31	46	19	19	115
QMB/SLMB/QI	28	36	9	25	98
Volunteer Recruitment	0	0	11	7	18
<b>Targeted Audience</b>					
African American	50	26	15	13	104
American Indian or Naitave Alaskan	59	34	12	13	118
Asian Indian	0	0	7	3	10
Caucasian	70	70	26	26	192
Chinese	0	0	8	6	14
Disabled	66	59	25	28	178
Dual Eligible Groups	0	0	10	24	34
Employer Related Groups	58	45	7	9	119
Family Member/Caregiver of Beneficiary	65	61	28	35	189
Filipino	0	0	7	6	13
Guamanian or Chamorro	0	0	7	5	12
Hispanic / Latino	65	58	16	17	156
Hmong	0	0	9	9	18
Japanese	0	0	8	5	13
Korean	0	0	7	6	13
Low Income	66	59	25	37	187
Medicare Beneficiaries	61	55	30	44	190
Medicare Pre-Enrollees	0	0	18	32	50
Mental Health	63	53	12	22	150
Mental Health Professionals	0	0	7	19	26
Native Hawaiian	0	0	7	5	12
Other	1	3	8	6	18
Other Asian	46	34	9	2	91
Other Pacific Islander	42	21	8	4	75
Partnership Outreach	0	0	11	19	30
Presentations to Groups in Language Other than English	47	25	4	3	79
Rural	67	38	26	33	164
Samoan	0	0	7	5	12
Socail Work Professionals	0	0	9	23	32
Some Other Race or Ethnicity	0	0	5	1	6
Vietnamese	0	0	7	6	13

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#### Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	638	0	0	638
<b>Literature from Events</b>					
General HICAP Brochure	958	1,227	1,042	723	3,950
"Taking Care of Tomorrow"	92	178	63	83	416
Other Publications (Created by or on Behalf of Local HICAP)	1,671	2,447	1,531	1,354	7,003
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	3	11	4	15	33

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 3 - Passages - HICAP

From: 07/01/2010 To: 06/30/2011

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	752	1,593	881	909	4,135
Total Finalized Intakes	340	1,223	457	401	2,421
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	107	187	142	97	533
Aging into Medicare Postacd - CDA HICAP	0	0	0	0	0
CDA HICAP	13	75	10	1	99
CHA	1	0	0	0	1
CMS/Medicare	17	41	15	19	92
Friend/Relative	44	108	42	35	229
InfoVan	0	0	0	0	0
Internet	0	3	0	1	4
Mailings	0	0	1	3	4
Media	18	43	10	25	96
Other	72	180	47	41	340
Presentations	9	54	34	16	113
Previous Contacts	0	1	94	111	206
State Website	0	0	0	0	0
Missing/Not Collected	59	531	62	52	704
<b>Mode of Client Contact</b>					
Quick Call Contacts	1,164	1,955	1,226	1,174	5,519
Contacts by Telephone	455	1,219	711	653	3,038
Contacts In Person at home	13	46	49	25	133
Contacts In Person at site	203	444	222	197	1,066
Contacts by E-Mail	739	2,790	333	91	3,953
Contacts by Mail/Fax	0	2	157	156	315
Total Number of Client Contacts:	2,574	6,456	2,698	2,296	14,024
<b>Contact Status Types</b>					
General info	0	8	366	610	984
Detailed Assistance	2	6	780	977	1,765
Problem Solving/Resolution	0	2	327	167	496
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	73.05	68.52	49.44	44.49	235.50
Volunteer	202.48	363.03	239.36	185.25	990.12
Paid	186.35	736.47	310.42	281.54	1,514.78
In-Kind	15.20	49.05	9.10	4.00	77.35
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	25	34	25	14	98
<b>Race</b>					
African American/Black	2	6	4	1	13

From: 07/01/2010 To: 06/30/2011

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	1	8	2	2	13
Caucasian/White	226	562	238	240	1,266
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	0	0	0	0	0
Filipino	0	3	2	0	5
Japanese	1	1	2	0	4
Hmong	0	0	1	1	2
Korean	0	0	0	0	0
Vietnamese	3	5	0	4	12
Other Pacific Islander	0	0	0	0	0
Other Asian	0	0	0	0	0
Two or More Race	4	4	1	2	11
Some Other race	2	2	1	1	6
Not Collected	101	632	206	150	1,089
<b>Gender</b>					
Female	184	734	260	225	1,403
Male	103	374	137	131	745
Not Collected	53	115	60	45	273
<b>Monthly Income</b>					
Less than 150% of FPL	105	265	137	107	614
Equal To/Greater than 150% of FPL	135	373	153	147	808
Not collected	100	585	167	147	999
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	101	114	215
At or Above LIS Asset Limit	0	0	52	110	162
Not Collected	340	1,223	304	177	2,044

From: 07/01/2010 To: 06/30/2011

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
<b>Total Clients that Checked Yes as Being</b>					
Veteran	21	37	24	24	106
Limited English Proficient (LEP)	10	13	17	7	47
Dual Eligible	61	227	141	120	549
Medicare Status Due to Disability	54	143	110	83	390
Dual Eligible due to Mental Disability	0	0	20	24	44
Applying/Receiving Social Security/Medicare Disability	0	0	80	85	165
<b>Age</b>					
Under 60	46	127	69	52	294
60-64	20	66	43	72	201
65-74	123	348	172	133	776
75-84	51	245	58	62	416
85+	26	133	39	29	227
Not Collected	74	304	76	53	507
<b>Marital Status</b>					
Married	107	331	130	130	698
Never Married	25	56	47	26	154
Separated	7	14	6	5	32
Divorced	50	131	66	68	315
Widowed	56	142	55	66	319
Domestic Partner	0	3	3	2	8
Not Collected	95	546	150	104	895
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	7	42	29	44	122
Estimated Dollars Saved	\$4,763.00	\$92,294.92	\$51,626.79	\$104,770.06	\$253,454.77

# Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 3 - Passages - HICAP

From: 07/01/2010 To: 06/30/2011

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	308	1,136	423	388	2,255
Benefit Comparisons/Explanation/Coverge Changes	217	680	395	347	1,639
Appeals/Grievances	7	17	7	12	43
Billings/Claims	30	83	51	82	246
Fraud/Abuse	1	11	18	31	61
Quality of Care	0	0	1	3	4
LTC/LTCI					
Enrollment/Eligibility Assistance	18	24	24	38	104
Billings/Claims	6	0	1	8	15
LTC Partnership	0	0	1	2	3
Appeal/Greivances	0	0	1	1	2
Fraud/Abuse	0	0	3	1	4
Other LTC	0	0	3	9	12
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	216	510	233	277	1,236
Benefit Explanation	157	393	186	214	950
Appeals/Grievances	0	12	4	8	24
Billings/Claims	16	69	27	59	171
Fraud/Abuse	0	3	4	10	17
Disenrollment/Coverage Changes	34	124	43	28	229
Quality of Care	0	0	1	1	2
Plan Comparison	0	0	91	121	212
Marketing/Sales Complaints/Issues	0	0	7	4	11
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	124	387	132	157	800
Benefit Explanation	106	329	119	123	677
Appeals/Grievances	2	11	8	3	24
Billings/Claims	11	58	18	35	122
Fraud/Abuse	1	3	5	4	13
Coverage Changes/Disenrollment	24	107	34	17	182
Plan Non Renewal	0	2	9	1	12
Plan Comparison	0	0	53	69	122
Enrollment/Enrollment Asistance	0	0	7	9	16
Quality of Care	0	0	1	2	3
Marketing/Sales Complaints or Issues	0	0	7	7	14
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	20	27	159	173	379
Medi-Cal Application Assistance	0	0	7	8	15

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	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	38	83	211	295	627
MSP Application Assistance	0	0	23	18	41
Medi-Cal/QMB Claims	0	0	11	17	28
Fraud/Abuse	3	0	3	3	9
Other	177	635	87	22	921
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	65	64	65	79	273
Military Benefits	23	38	22	43	126
COBRA	6	6	3	13	28
Mental Health Topics	7	24	27	24	82
Fraud/Abuse	1	1	5	5	12
Other Health Insurance	0	0	7	8	15
Other	19	22	24	16	81
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	1	2	286	332	621
Eligibility/Screening	275	1,110	363	318	2,066
Plan Comparison	207	962	266	208	1,643
Enrollment/Anrollment Assistance	68	863	202	129	1,262
Billings/Claims	12	162	64	70	308
Coverage Changes	34	819	200	175	1,228
Re-enrollment	3	10	21	8	42
Disenrollment	0	1	13	12	26
TROOP	3	45	6	3	57
Other	51	68	24	31	174
<b>LIS / Extra Help</b>					
Eligibility / Screening	222	692	312	285	1,511
Benefit Explanation	1	1	92	119	213
Application Assistance	56	66	29	24	175
Claims/Billings	0	0	23	43	66
Appeals / Grievances	5	10	3	3	21
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	44	31	39	46	160
PPARx	3	23	9	12	47
Military Drug Benefit	0	0	14	27	41
Manufacturer Program	4	34	9	11	58
Other	6	9	8	15	38
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	9	14	55	110	188
Lag Time	2	4	10	0	16
Multiple Enrollment	3	2	3	3	11
Poor Training of Agents	0	0	8	3	11
Poor Training of CSR	0	1	6	2	9

From: 07/01/2010 To: 06/30/2011

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
Fraud/Abuse	0	1	3	4	8
Marketing Fraud/Abuse	1	1	1	0	3
Agent fraud/abuse	0	1	1	1	3
Formulary problems/changes	3	6	19	34	62
Dosage problem	0	0	6	15	21
Data problems	2	3	8	4	17
Delay in medications	0	6	3	7	16
Incorrect Co-Pay/Can't Afford Co-Pay	2	3	6	9	20
Client reached donut hole	10	23	3	6	42
SSA Premium withheld	1	1	2	1	5
Appeals/Grievances	0	0	4	2	6
Quality of Care	0	0	2	4	6
Plan Non Renewal	0	0	6	0	6
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**Health Insurance Counseling and Advocacy (HICAP) Aggregate Report****Program: PSA 3 - Passages - HICAP**

From: 07/01/2010 To: 06/30/2011

**Complaints Filed**

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	1	0	<b>1</b>
CMS:	2	0	2	1	<b>5</b>
Part D Plan:	1	0	2	0	<b>3</b>
SMP:	0	0	1	1	<b>2</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	1	0	2	0	<b>3</b>
Other:	2	69	18	19	<b>108</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>6</b>	<b>69</b>	<b>26</b>	<b>21</b>	<b>122</b>

**All Other Complaints**

APS :	0	0	0	0	<b>0</b>
CDI:	0	0	1	0	<b>1</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	1	<b>1</b>
Other:	1	0	0	0	<b>1</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>3</b>

**800 Medicare Line Issues**

<b>Total number of Calls with Issues</b>	<b>13</b>	<b>24</b>	<b>50</b>	<b>42</b>	<b>129</b>
<b>Total duration of calls</b>	<b>14.36</b>	<b>17.08</b>	<b>33.55</b>	<b>16.44</b>	<b>81.43</b>